



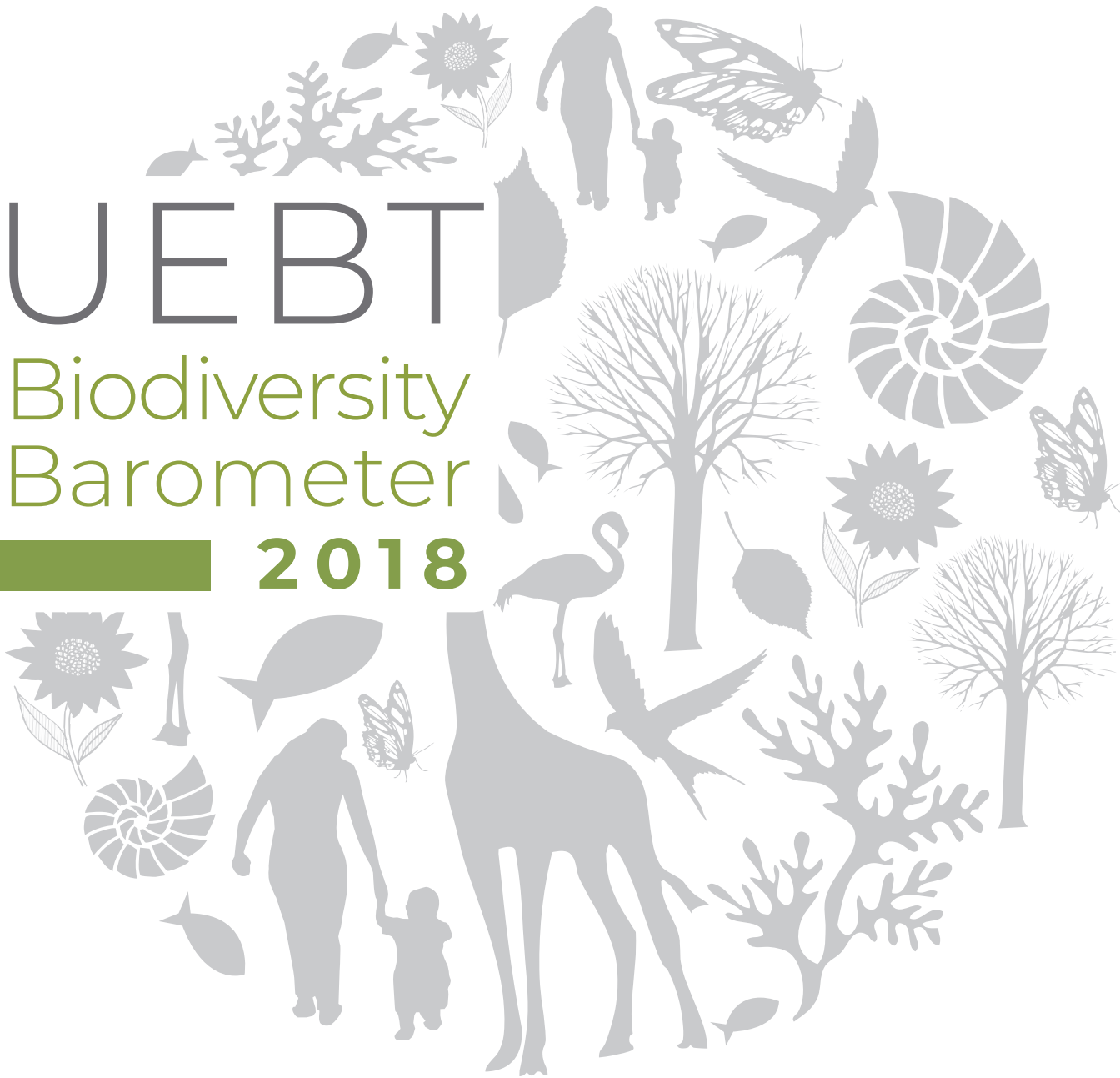
UNION FOR
ETHICAL
BIOTRADE

SOURCING[®]
WITH RESPECT

UEBT

Biodiversity Barometer

2018



CELEBRATING TEN YEARS OF UEBT BIODIVERSITY BAROMETER

Since 2009, UEBT assessed awareness of biodiversity, and interest in ethical sourcing in 16 different countries. Ten years of research, among 64,000 people, and hundreds of leading companies, has provided several valuable insights that may guide companies and governments in their approaches towards people and biodiversity.






10 TAKEAWAYS

1. **Awareness and understanding of biodiversity** is growing globally. It is highest among youth. It also increases among **lower incomes**, becoming more mainstream.
2. Consumers find **biodiversity** conservation important **for their personal well-being** and that of generations to come. They want to personally contribute, but don't know how.
3. **Respecting people and biodiversity** in purchase behaviour is of **growing concern** for consumers. Buying products with natural ingredients that are sourced with respect makes them feel good.
4. People **expect companies to respect** biodiversity, but **don't trust** they do.
5. **Transparency** is becoming essential for consumers. They want more information on packaging and externally validated information on sourcing with respect.
6. **Authentic** stories, proof of **good practices on the ground**, and **clear communication** are key to convince consumers of companies' respect for people and biodiversity.
7. **Millennials (Gen Y & Z)** have the highest awareness of biodiversity and can identify brands that respect biodiversity. They value companies that **walk the talk** by taking concrete actions.
8. **Corporate communication** on biodiversity by beauty, food, and beverage companies is **rising year-on-year**.
9. **Opportunities** exist for brands that wish to position themselves around sourcing with respect for people and biodiversity. Nowadays just **Natura Cosmetics** is recognised by more than 50% of consumers in Brazil.
10. Consumers are increasingly interested in **naturals**, and companies are investing in **biodiversity based R&D**. Complying with evolving **Access and Benefit Sharing (ABS)** legislation is becoming an increasingly important factor in reputation risk management.






WHY CONSUMERS CARE ABOUT SOURCING WITH RESPECT

80%
Biodiversity promotes
my well-being and
my quality of life








83% 
80% 
67% 
79% 
92% 

89%
It is the obligation of humans
to protect nature






91% 
88% 
82% 
91% 
94% 

85%
We may only use nature
in such a way that affords
coming generations the
same opportunity






90% 
87% 
74% 
81% 
91% 



80%
It is important for me to
personally contribute to
conserving biodiversity

82% 
84% 
68% 
77% 
91% 

74%
It will affect me personally
if biodiversity disappears

78% 
71% 
64% 
69% 
89% 

Q6B. To what extent do you agree with each of the following statements about biodiversity and nature?
Total "Agree"
Base: all sample

"Around the world, the majority of consumers feel involved regarding biodiversity, on a global and a more personal level" - IPSOS



WHAT WE EXPECT FROM COMPANIES

Most survey respondents think that companies have a moral obligation to have a positive impact on society, people and biodiversity. Trust in companies has been very low over the last decade. Consumers require evidence about companies' commitment to responsible sourcing. Verification by an independent organization, insight in concrete actions that a brand takes, or an on-pack label are seen as ways to prove brand commitment. Respondents indicate that respect for people and biodiversity is a driver of purchase for them, especially in Brazil. Buying products with natural ingredients that are sourced with respect makes them feel good, makes them feel they can have a positive impact on society. Especially in the UK and the USA these numbers are up.

79%
“ I think companies have a **moral obligation** to assure they have a positive impact on people and biodiversity

74%
“ It makes me **feel good** when I buy a product that respects on biodiversity and people

37%
“ I am confident that companies **pay serious attention to ethical sourcing** of biodiversity

70%
“ I have more faith in a company whose **commitment is certified with a label** on its products

70%
“ I have more faith in a company whose commitment to ethical sourcing of biodiversity is **verified by independent organizations**



Q6: Here is a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?
Total "Agree" - Basis - all sample

TRANSPARENCY - WHAT CONSUMERS EXPECT ON PACKAGING

When asked what information they would like to see on product packaging, consumers rated the following highest: list of ingredients, the impact on biodiversity (support for bees, wild flowers, replanting no deforestation), and the origin of ingredients. Respondents rated the social impact and fair compensation of actors of the production chain slightly lower. From all surveyed countries in 2018, Brazilian consumers seem to be most interested in information on product packaging.

87%
“ The list of ingredients/components

81%
“ The impact on biodiversity

81%
“ The origin of the ingredients

76%
“ The social impact of the sourcing of the ingredient

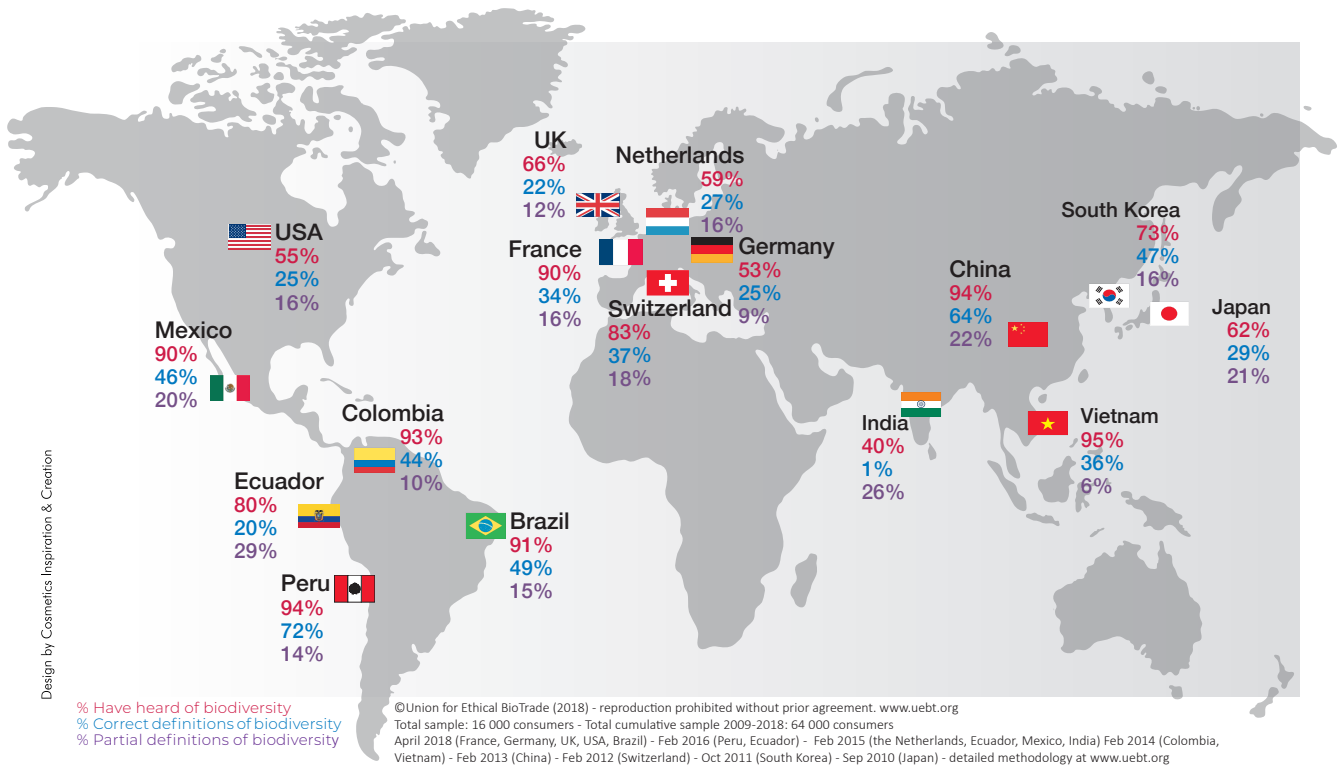


73%
“ The fair compensation for the various actors in the production chain

Q7: For each of the following elements, please tell us how much important it is for you to get this information on the packaging?
Total "Important" - Basis - all sample

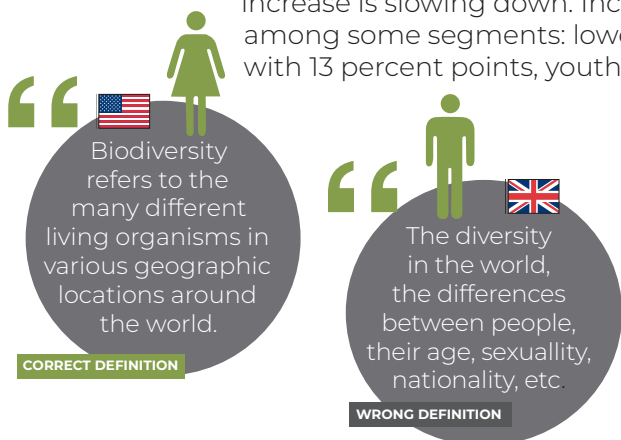
CELEBRATING 10 YEARS OF THE UEBT BIODIVERSITY BAROMETER

Since 2009, UEBT assessed awareness and understanding of biodiversity in 16 different countries around the world. Awareness rates are growing, but vary strongly among countries. A lot remains to be done to meet the UN 2020 biodiversity target #1 "By 2020 people are aware of the values of biodiversity and the steps they can take to conserve and use it sustainably."



WHO KNOWS WHAT BIODIVERSITY MEANS?

Between 2009 and 2018 awareness rates and understanding of biodiversity have gone up in the countries surveyed annually by UEBT. However, the last years the increase is slowing down. Increase has been particularly strong among some segments: lower income groups grew on average with 13 percent points, youth with 19 points.



When consumers in France, Germany, and Brazil give a wrong definition of biodiversity, they talk about sustainable development, ecology or organic agriculture. In the UK and the USA, people talked about racial differences.

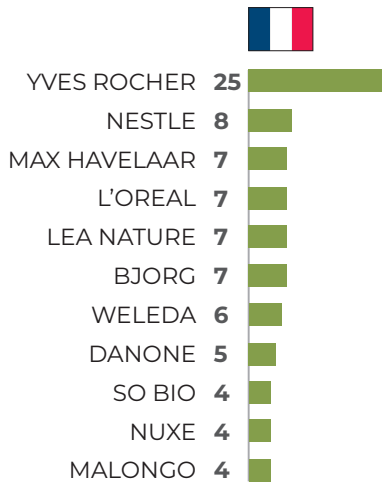
39%
Of young consumers correctly defines biodiversity
Basis - all sample - 5 countries

	Total	Lower Income	Youth 16 - 24
France, Germany, UK, USA			
Heard of Biodiversity	+10	+15	+16
Correct definition	+10	+14	+20
Focus GERMANY			
Heard of Biodiversity	+24	+32	+31
Focus USA			
Correct definition	+20	+32	+25

Q1/Q2: Personally, have you ever heard of biodiversity? / What does biodiversity mean?
 Progress 2009-2018 - Basis - all sample - 4 countries - Young people = aged 16-24 years old

CONSUMERS VIEWS ON BRANDS THAT RESPECT PEOPLE AND BIODIVERSITY

There is still ample opportunity for brand positioning around sourcing with respect: when asked to name a brand that respects people and biodiversity, only 54% of respondents could cite one.



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity?
Basis - respondents mentioning at least one brand



Yves Rocher

30%
Of female respondents cited Yves Rocher

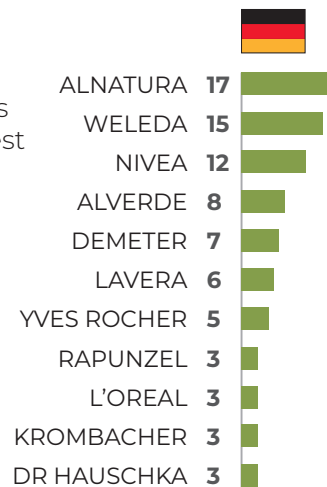


Weleda

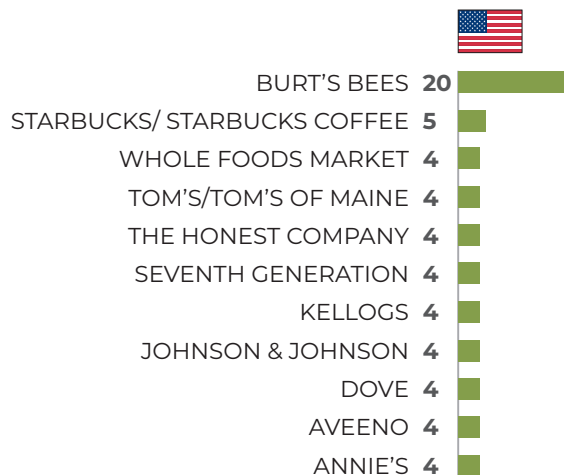
"Through our partnership with UEBT, we have really deepened our commitment to organic and ethical sourcing over the last 10 years and are very proud that, together with our customers, we do our bit in protecting the planet."

Head of Global Marketing
Weleda

21%
Of female respondents cited Weleda, the highest amongst women in Germany



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity?
Basis - respondents mentioning at least one brand



32%
Of female respondents under 30 years old cited Burt's Bees

Burt's Bees



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity?
Basis - respondents mentioning at least one brand

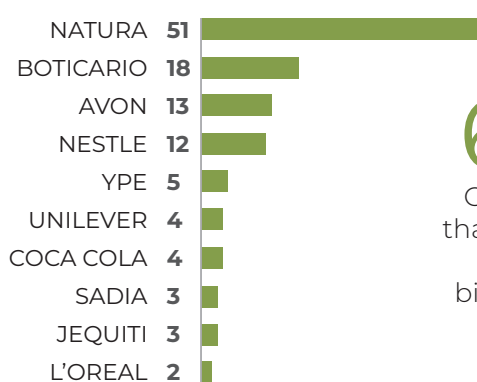


The Body Shop

43%
Of higher income respondents cited The Body Shop



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity?
Basis - respondents mentioning at least one brand



62%
Of respondents that gave a correct definition of biodiversity cited Natura



Natura

Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity?
Basis - respondents mentioning at least one brand

"Natura, The Body Shop and Aesop share a common commitment to sustainable and ethical business practices. These same values drive the Natura & Co group, a global cosmetics group that brings together the three companies." Executive Chairman of Natura & Co's Board of Directors

COMPANY REPORTING ON BIODIVERSITY

Between 2009 and 2018 business awareness of, and commitment to, ethical sourcing of biodiversity has increased significantly. Company reporting on biodiversity, both as a general topic and as issue in supply chains, keeps rising year-on-year.

What are companies saying about biodiversity

- Companies reporting on sustainable development
- Companies reporting on biodiversity
- Companies reporting on biodiversity in the supply chain
- Companies reporting on Access and Benefit Sharing

	Beauty		Food	
	2018	2009	2018	2012
Companies reporting on sustainable development	66	44	98	91
Companies reporting on biodiversity	42	13	70	53
Companies reporting on biodiversity in the supply chain	39	9	53	41
Companies reporting on Access and Benefit Sharing	10	2	3	2

Basis: Research conducted by UEBT in April 2018 based on the 2017 Beauty's Top 100 of Women's Wear Daily, and the 2017 Food and Beverage Top 100 of the Food Engineering Mag.

A methodology based on three areas of research

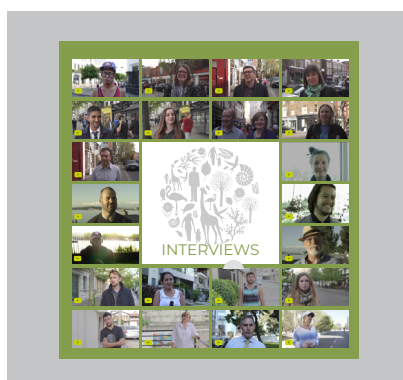


Consumer survey

UEBT commissions independent market research companies to conduct consumer research for the UEBT Biodiversity Barometer. Interviews are conducted with national representative samples of 1000 persons per country. To correct sampling disparities, a post-stratification weighting of results, based on socio-demographic variables, is applied.

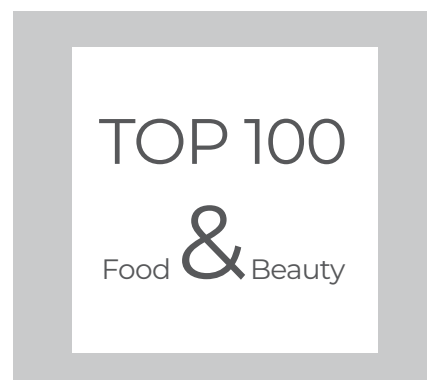
For cost reasons, UEBT opts for internet surveys where possible. In some countries face-to-face interviews and phone interviews are used. Different methods may slightly influence research outcomes. The research between 2009 and 2018 has been conducted by IPSOS on behalf of UEBT.

For or more information, please see www.biodiversitybarometer.org



Consumer Stories

Camera interviews are conducted with consumers in some of the countries where the consumer research for the Biodiversity Barometer is conducted. UEBT selects footage to illustrate the outcomes of its consumer research. People interviewed in these videos are not the same as those participating in the consumer surveys, and video interviews are not based on national representative samples.



Company reporting

To assess attention to ethical sourcing of biodiversity in company reporting, UEBT reviews communication materials of the top 100 beauty and food & beverage companies in the world. The review includes publically available documents only, such as statements on websites, sustainability reports, and policies. UEBT only assesses if issues related to ethical sourcing of biodiversity are mentioned, the quality of the reporting or the actions undertaken doesn't influence the rankings.

In 2017, UEBT also interviewed various experts in the sector to gain deeper understanding.

The 2018 Biodiversity Barometer was undertaken with the support of:

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UEBT is independent, impartial and objective in its dealings with governments, political parties, other organisations and individuals.

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